

To: TurboTax Montana Customer  
From: Bob Meighan, VP TurboTax  
Subject: Important Message Concerning Your 2007 Montana Return

We are sending you this notice because the 2007 TurboTax Montana return you filed **MAY** have incorrectly reported your federal tax payments and/or tax refund. While this error affects a small number of Montana customers, we are notifying a larger group to ensure that no one is overlooked. In most cases, affected customers will receive a tax refund.

This affects you only if either of the two cases applies:

Case 1:

1. You filed your 2006 Montana return using TurboTax AND
2. You itemized your deductions in 2006 AND
3. You received a refund on your 2006 federal return AND
4. You transferred your 2006 information to 2007 TurboTax.

Case 2:

1. Your 2007 Montana filing status was Married Filing Separate - Combined AND
2. You itemized your deductions in 2007 AND
3. You had federal tax withheld or made federal estimated tax payments in 2007 AND
4. Your spouse had no federal tax withholding or estimated tax payments in 2007.

If either case applies, you should file an amended 2007 Montana return. If you filed using TurboTax Online, you must file your amended return by October 15, 2008. Amending your Montana return takes just a few minutes and the simple steps are described on the following pages. If you're still in doubt whether this applies to you, we suggest you follow the steps to see if your Montana tax liability changes from what you originally filed.

Our Accuracy Guarantee protects you by paying any penalty and/or interest Montana may charge you resulting from this issue. If this happens, just let us know and we'll take care of it.

We apologize for any inconvenience this may cause you. If you have additional questions or if your e-mail program cannot display the images contained within this notice, please visit <http://turbotax.intuit.com/support/go/6352>. If you still have questions, please call us at (888) 777-4160.

Sincerely,  
Bob Meighan  
VP, TurboTax

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This message was sent to inform you of a critical matter. If you have chosen not to receive marketing messages from Intuit, that choice applies only to promotional materials. You will continue to receive critical notifications that are legally required or that could affect your service or software.

## Process for Filing An Amended 2007 Montana Tax Return

1. Return to TurboTax.
2. TurboTax CD/Download customers follow steps 2a and 2b. TurboTax Online customers skip to step 3:
  - a. Select **Online / One-click Updates** (Mac customers: Select TurboTax / Check for Updates). Important: If TurboTax asks whether you want to save your file, select **No**.
  - b. After TurboTax is done updating, Select **File / Save As** and add "Amended" to the file name. For example, change "2007 Doe J Tax Return.tax" to "Amended 2007 Doe J Tax Return.tax". Use the Amended file from now on (including next year's transfer). Your original tax file remains unchanged and reflects what you originally filed.
3. Select the **State Taxes** tab.
4. Choose **Montana**.
5. On the Welcome to Your 2007 Montana Return screen, choose **Continue**
6. On the next screen (see Screen 1), select "**I'm amending because I received an e-mail from TurboTax**" and then choose **Continue**.

**TurboTax Premier**

Personal Info Federal Taxes Federal Review **State Taxes** Print & File

Colorado Maine **Montana** New York

MT Refund **\$806**

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### Amending Your Return or Filing for the First Time?

**Important:** If you received an e-mail from Turbo Tax telling you to amend your 2007 Montana return, check the appropriate box below.

Otherwise, let us know if you are amending for another reason, or if this is the first time you are filing a 2007 Montana return.

☒ I'm amending because I received an e-mail from Turbo Tax

☐ I'm amending for another reason

☐ I'm filing for the first time

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Back Continue

Screen 1: Amending your return

7. If Case 1 applies to you, follow step 7a. If Case 2 applies to you, follow step 7b:
  - a. Case 1: In the first box (see Screen 2), enter the 2006 federal income tax refund you received. Choose **Continue**.

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Personal Info Federal Taxes Federal Review State Taxes Print & File

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**MT Refund**  
**\$806**

### Enter Your 2006 Tax Information

To begin amending your 2007 Montana return, we first need the information listed below from your 2006 federal and Montana returns.

If you do not have those returns, contact the Montana [Department of Revenue](#) and/or the Internal Revenue Service to get copies. You'll need this information in order to continue amending your return.

**Note:** Do not include any Earned Income Credit (EIC) in the amounts you enter.

	<b>Harry</b>	<b>Mary</b>
Enter the 2006 Federal refund from either line 73 - Federal form 1040, or line 44 - Federal form 1040A, or line 12 - Federal form 1040EZ:	<input type="text" value="1,266"/>	<input type="text"/>
	<b>Harry</b>	<b>Mary</b>
Add lines 7a through 7d from your 2006 Montana return, Schedule III, then enter total:	<input type="text" value="1,000"/>	<input type="text"/>

[Back](#) [Continue](#)

Screen 2: 2006 Federal income tax refund

b. Case 2 – Choose Continue.

8. On Screen 3, enter your 2007 Montana refund or balance due from the original 2007 Montana tax return you filed. Choose **Continue**.

The screenshot shows the TurboTax Premier interface. At the top, there are tabs for 'Personal Info', 'Federal Taxes', 'Federal Review', 'State Taxes', and 'Print & File'. Below these, a sub-menu shows 'Colorado', 'Maine', 'Montana' (selected), and 'New York'. A search bar and 'Topic List' are also visible. On the left, a sidebar titled 'Get Answers' includes links like 'Find Tax Help', 'Using TurboTax', 'View Tax Summary', 'TurboTax Support', 'Community', 'Live Tax Advice', and 'Send Us Feedback'. The main content area is titled 'Enter Your 2007 Montana Refund or Amount Due'. It contains a text box with the instruction: 'Next we need to know the refund or amount due from your original 2007 Montana return (the one you already filed)'. Below this, there are two input fields: 'Original 2007 MT refund (Line 74, Form MT2)' and 'Original 2007 MT balance due (Line 71, Form MT2)'. A mouse cursor is pointing at the first input field. At the bottom, there are 'Back' and 'Continue' buttons. In the top left corner, a box displays 'MT Refund' with a large green '\$806'.

Screen 3: Montana original liability

9. Continue through the next few screens until you reach the "Print and Mail Your Amended Return" screen. Choose **Print Amended Return**. There is no need to print your federal return again.
10. Handwrite "**TurboTax**" at the top of Form 2 to expedite processing.
11. Mail your amended Form 2 to the address on the printed filing instructions.